

## Estate Planning Pitfalls and How to Avoid Them From Start to Finish

*Trusts and Estates Law*



Live Online

**Date:** Thursday, July 16, 2026 | 9:00 am to 12:00 pm

**Location:** Live Online Only



**Program Chairs:** [Daniel Stober](#), [Torkin Manes LLP](#)  
[Brittany Sud](#), [Torkin Manes LLP](#)

**Substantive Hours:** This program contains up to **3 hours and 00 minutes**.

*The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.*

A single overlooked question during client intake, one poorly worded clause in a Will, or an ill-considered appointment in a Power of Attorney can lead to significant issues and exposure to professional liability. Join experienced lawyers as they share practical advice on how to avoid the pitfalls at every stage of the planning process. From the initial client meeting through to the execution of final documents, we'll dissect common and not-so-common errors, review cautionary examples, and equip you with practical strategies to avoid these pitfalls. Register now to ensure you have the strategies you need to confidently navigate the estate planning process from start to finish.

*If you've discovered an error or omission in an executed will, check out our companion session [Discovering Errors and Omissions in a Will: The Report, The Repair, and \(Avoiding\) the Claim](#).*

<p>9:00 am Welcome and Opening Remarks</p> <p>9:05 am <b>Mastering Client Intake, Information Gathering, Execution and Reporting</b>  <a href="#">Meghan O'Neil</a>, <a href="#">O'Neil Estate Law</a></p> <p>9:35 am <b>Where Things Go Wrong in Will Drafting</b>  <a href="#">Jessica Elie</a>, <a href="#">Loopstra Nixon LLP</a>  <a href="#">Matthew Rendely</a>, <a href="#">Loopstra Nixon LLP</a></p> <p>10:25 am Health Break</p>	<p>10:40 am <b>Avoiding Traps in Power of Attorney Drafting</b>  <a href="#">Hilary Van de Kamer</a>, <a href="#">Robinsons Law PC</a></p> <p>11:10 am <b>The Law Pro Perspective</b>  <a href="#">Leanne Fasciano</a>, <a href="#">LAWPRO</a></p> <ul style="list-style-type: none"> <li>• What claims/reports arising from estate planning does Law Pro commonly see?</li> <li>• What crosses their desk frequently?</li> </ul> <p>11:45 pm Questions and Concluding Remarks</p> <p>12:00 pm Program Concludes</p>
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